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IDENTIFIERS *Bellevue School District WA

ABSTRACT

This mix of presentation graphis, forms, and text presents guidelines for developing a school-district policy for selecting consultants to design and carry out school-building projects. The specific policy presented is that of the Bellevue (Washington) School District. The manual describes how to: (1) develop a written consultant-selection policy; (2) conduct architectural interviews; (3) develop formal written guidelines and policies; (4) conduct consultant notification and fee negotiations; (5) maximize community and staff involvement; (6) create a successful match between consultants and the school-building project; and (7) conduct a postevaluation. The advantages and disadvantages of this type of architectural-selection process are described. Sample checklists, policies, and building plans are included. (LMI)

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ED 392 148

ASBO INTERNATIONAL MEETING
OCTOBER 1995

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"CREATING A SUCCESSFUL CONSULTANT SELECTION PROCESS FOR YOUR SCHOOL BUILDING PROJECT"

DAUNNE ZINGER
MANAGER OF CAPITAL PROJECTS
BELLEVUE SCHOOL DISTRICT

EA 027377

LEARNING OBJECTIVES:

HOW TO DEVELOP A WRITTEN
CONSULTANT SELECTION POLICY

WAYS TO CONDUCT
ARCHITECTURAL INTERVIEWS

DEVELOPING FORMAL WRITTEN
GUIDELINES/POLICIES

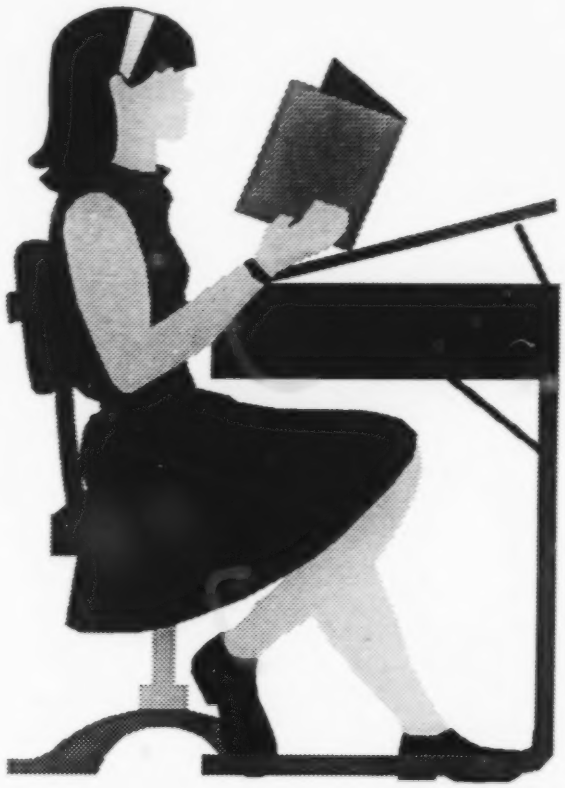
MAXIMIZING COMMUNITY
AND STAFF INVOLVEMENT

CREATING A SUCCESSFUL MATCH

I. BACKGROUND & OVERVIEW

A. DESCRIPTION OF BELLEVUE SCHOOL DISTRICT

- Suburban/Urban
- 15,000 Avg. Student Population
- 30+ School Facilities
- Most Capital Projects not eligible for State funding
- Schools are site based



DESCRIPTION OF BELLEVUE'S CAPITAL IMPROVEMENT PROGRAM

- Large Modernization/Refurbishments
- Safety Upgrades
- Instructional Space Improvements
- Field Renovations
- New Early Childhood Centers
- Technology Upgrades
- Hazardous Materials
- Emergency Projects

II. REVIEW OF BELLEVUE'S CONSULTANT SELECTION POLICY

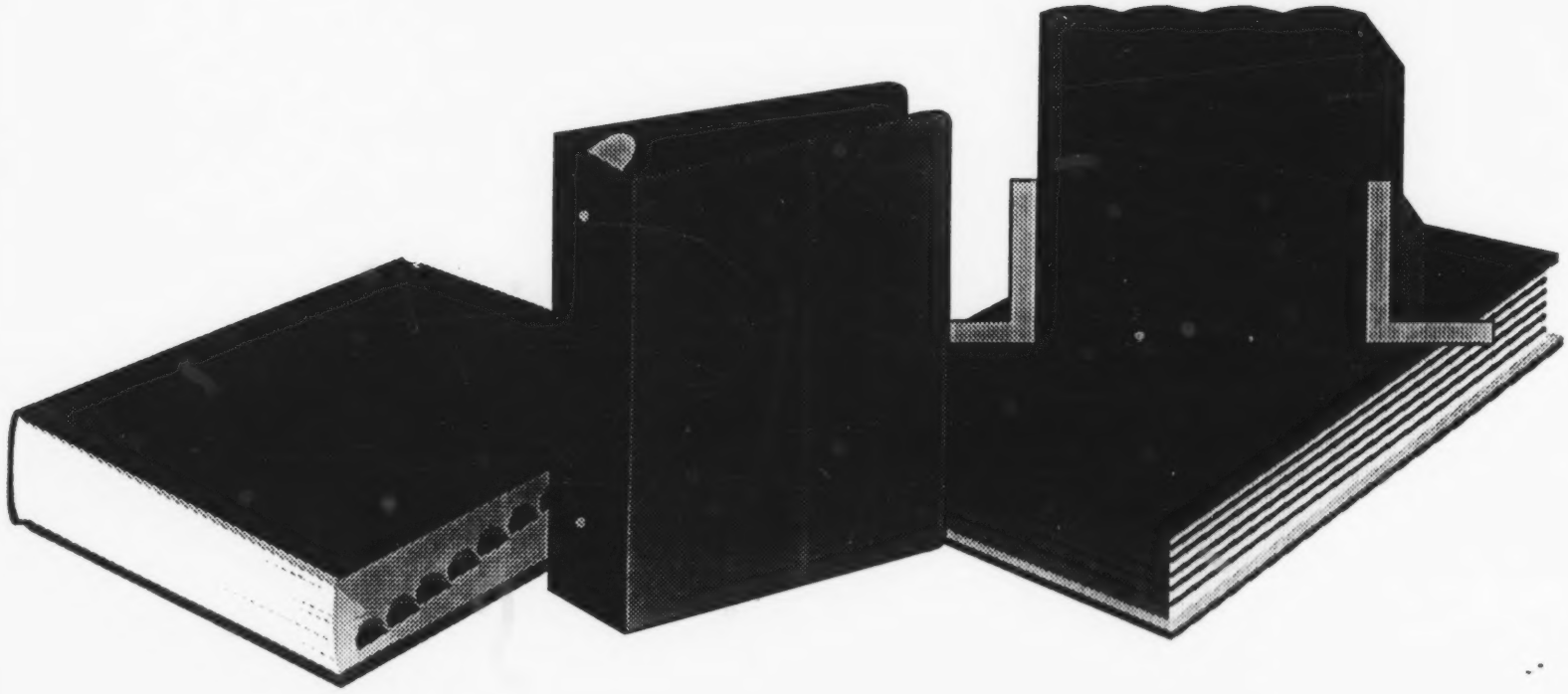
A. WHY DEVELOP A POLICY?

B. WHAT OUR POLICY REQUIRES AND DOESN'T REQUIRE

A. WHY DEVELOP A POLICY?

- To establish a fair, equitable system for consultant selection
- Provide for a public and open selection process
- Establish standards (written and oral)
- Provide opportunities for women/minority owned firms to compete on a more equal basis
- Provide something in writing that district employees follow when selecting A/E consultants

B. WHAT OUR POLICY REQUIRES AND DOESN'T REQUIRE



BELLEVUE SCHOOL DISTRICT NO. 405 Policy No. 8825

Date of Board Adoption: 3 November 1981 Page 1 of 1
Revised: 5 March 1991

ARCHITECTURAL AND ENGINEERING SERVICES*

POLICY

District requirements for architectural and engineering professional services shall be publicly announced. Contracts shall be negotiated on the basis of demonstrated competence and qualifications for the type of professional services required, and at a fair and reasonable price.

In making a determination of a price which the District deems to be fair and reasonable, the District shall take into account the scope, complexity and professional nature of the project or service.

District procedures and guidelines shall include a plan to insure that women and minority-owned firms are afforded the maximum practicable opportunity to compete for and obtain public contracts for services.

Upon completion of negotiations, the Board of Directors shall be asked to approve all contracts for architectural and engineering services in amounts in excess of $50,000. The Superintendent or his/her designee shall be authorized to approve all contracts for architectural and engineering services in amounts less than $50,000.

The public announcement provision of this policy may be waived if the Board of Directors determines that an emergency will require immediate appointment of an architectural or engineering firm.

*Includes land surveyors and landscape architects.

Reference: Chapter 61, Washington Laws 1981 (RCW 39.30)

BELLEVUE SCHOOL DISTRICT NO. 405

Procedure No. 8825.1

Policy Reference No. 8825

Title: Architectural and Engineering Services

Page 1 of 5

Effective Date:

Section: SUPPORT SERVICES

1 January 1982
Revised: 5 March 1991

ARCHITECTURAL AND ENGINEERING SERVICES*

PROCEDURE

Services $50,000 and Over

When architectural and engineering services are required by the District and the estimated amount of the contracted service will be $50,000 or more per project. the following procedures will be followed:

1. Needs for services will be publicly announced stating at least the following:

   1.1 General nature and scope of the project.

   1.2 Address and phone number of the District representative who can provide the District's Consultant Data Form and further details regarding the selection criteria and screening process.

   1.3 Acknowledgement that women and minority-owned firms are encouraged to apply.

   1.4 Deadline for submission of proposal or letter of interest, the District Consultant Data Form and such other information as felt necessary by the applicant.

   The District will make announcements for professional services in local professional and community publications of general circulation as well as in local publications oriented specifically toward women and minority-owned firms.

   Firms interested in being considered for a project must submit their qualifications to the Facilities/Maintenance Office by the deadline stated in the announcement. If the firm has qualifications on file with the District, and such qualifications are for the current year, then the firm is to notify, in writing, the Facilities/Maintenance Office of the firm's interest in the project and the fact that its qualifications are on file and current.

ARCHITECTURAL AND ENGINEERING SERVICES*

PROCEDURE

2. When the deadline for submission has passed, all submissions by applicants shall be reviewed and ranked by the appropriate staff in accordance with weighted criteria appropriate for the project and profession under consideration. (See Exhibit 8825.1.A)

3. The firm(s) ranked highest in the initial screening process, section 2 above, shall then be interviewed by appropriate staff.

   An architect or engineer external to the District, who is not an applicant for the project under consideration and who has expertise in the service required may also serve as an interviewer.

   Among the firms to be interviewed not less than one will be a women or minority-owned firm. Such a firm will be the highest ranked women or minority-owned firm from the applicants that were initially evaluated. This procedure assumes that women or minority-owned firms were among the initial applicants. If there are none, this paragraph will not apply.

   During the interview process the interviewers will discuss the firm's plans regarding the anticipated project and the relative utility of alternate methods for furnishing the required services.

4. At the conclusion of the interview phase, Section 3 above, the firm deemed most qualified will submit at a minimum the following before engaging in the negotiation of a contract:

   4.1 Description of the tasks to be completed.

   4.2 Person hours of effort planned for each task.

   4.3 Qualifications and categories of personnel who will be assigned to each task.

   4.4 Breakdown of pricing for the services to be provided.

   4.5 Time schedule for completion of all elements of the services to be provided.

ARCHITECTURAL AND ENGINEERING SERVICES*

PROCEDURE

The District contract shall be reviewed in its entirety with the firm being considered before a final price is agreed upon.

In determining a price which the District identifies as being fair and reasonable, the District shall take into consideration the scope. complexity and professional nature of the project or service.

If the District is unable to negotiate a satisfactory contract with the firm selected at a price the District determines to be fair and reasonable, negotiations with that firm shall be formally terminated by letter and the District will initiate negotiations with the next highest ranked firm.

5. When a contract has been negotiated with a firm, the contract shall be referred to the Board of Directors for ratification.

6. At the completion of a project an evaluation of the services rendered by the firm will be conducted. This evaluation of services will be shared with the firm and placed in the project file.

Services Less than $50,000

During the course of a year the District will require architectural and engineering services where the estimated cost of services per project is less than $50,000. When such is the case, the following procedures will be followed:

1. On an annual basis a public announcement will be made stating the anticipated needs of the District for architectural and engineering services of less than $50,000 per project.

   The District will make its annual announcement for professional services in local professional and community publications of general circulation as well as in local publication(s) oriented toward women and minority-owned firms.

2. The public announcement of anticipated needs shall include:

   2.1 Types of services

   2.2 Process to be used in selection

ARCHITECTURAL AND ENGINEERING SERVICES*

PROCEDURE

2.3 Address and phone number of the District representative who can provide the District's Consultant Data Form and further details regarding the selection process.

2.4 Acknowledgement that women and minority-owned firms are encouraged to apply.

3. Firms desiring to be considered for providing services shall be encouraged to apply for inclusion on the District's Architectural and Engineering Consultant Roster by submitting a statement of qualifications, performance data and the District's Consultant Data Form .

4. As projects arise, the qualifications on file of all applicants who provide the types of services required will be evaluated by appropriate Facilities/Maintenance staff.

5. The firm(s) evaluated highest for a specific project will be contacted prior to the interview to determine if they will be available to perform the service required.

The firm(s) evaluated highest and who responded that they will be available for services, shall then be interviewed.

6. The firm selected for the project as a result of interview shall, before engaging in the negotiations of a contract, submit at a minimum the following:

6.1 Description of the tasks to be completed

6.2 Person hours of effort planned for each task

6.3 Qualifications and categories of personnel who will be assigned to each task.

6.4 Breakdown of pricing for the services to be provided.

6.5 Time schedule for completion of all elements of the services to be provided.

BELLEVUE SCHOOL DISTRICT NO. 405

Procedure No. 8825.1

Policy Reference No. 8825

Title: Architectural and Engineering Services

Page 5 of 5

Effective Date:

Section: SUPPORT SERVICES

1 January 1982
Revised: 5 March 1991

ARCHITECTURAL AND ENGINEERING SERVICES*

PROCEDURE

The District contract shall be reviewed in its entirety with the firm being considered before a final price is agreed upon.

In determining a price which the District identifies to be fair and reasonable, the District shall take into consideration the scope, complexity and professional nature of the project or service.

If the District is unable to negotiate a satisfactory contract with the firm selected at a price the District determines to be fair and reasonable, negotiations with that firm shall be formally terminated in writing and the District will initiate negotiations with the next highest evaluated firm.

7. When a contract has been negotiated with a firm, the contract shall be approved by the Superintendent or his/her designee.

*Includes land surveyors and landscape architects.

Prepared by: Daniel Kinas
Signature

Title: Assistant Superintendent

Approved by: Daniel Kinas
Signature

Title: Assistant Superintendent

BELLEVUE SCHOOL DISTRICT NO. 405

Policy and/or Procedure Reference No.
Policy No. 8825
Procedure No. 8825.1

Exhibit No. 8825.1.A

Page 1 of 6

Effective: 6 May 1986
Revised: 5 March 1991

ARCHITECT AND ENGINEER EVALUATION

DATE: _____

Project _____

Firm _____

Evaluator _____

Rating:
0 = Unacceptable
1 = Below Standard
2 = Standard
3 = Above Standard
4 = Excellent

CRITERIA	RATING						
	WEIGHT	0	1	2	3	4	TOTAL
*1. QUALIFICATIONS - credentials, practical relevant experience, special training, references							
*2. STABILITY - history of firm, size of firm, growth, staff tenure							
*3. PROFESSIONAL QUALITY OF PRINCIPALS AND KEY STAFF - licensed to practice in State of Washington, education preparation, experience with this type of project, length of time with firm, percentage of principal involvement in project, ability to cooperate and communicate with others in the project							
*4. FIRM'S EXPERIENCE ON THIS TYPE OF PROJECT - past projects, recent experience with local planning and permit agencies							

ARCHITECT AND ENGINEER EVALUATION

CRITERIA	RATING						
	WEIGHT	0	1	2	3	4	TOTAL
*5. PLANNING AND BUDGET CONTROL CAPABILITIES - evidence of planning capability, budget control, change order history, past history of completing on schedule, pending litigation							
*6. WOMEN AND MINORITY-OWNED MANAGEMENT - is this a women and/or minority-owned firm? Will women and/or minorities be professional participants in this project?							
7.							
8.							
9.							

BELLEVUE SCHOOL DISTRICT NO. 405

Exhibit No. 8825.1.A

Policy and/or Procedure Reference No.
Policy No. 8825
Procedure No. 8825.1

Effective: 6 May 1986
Revised: 5 March 1991

ARCHITECT AND ENGINEER EVALUATION

CRITERIA	RATING						
	WEIGHT	0	1	2	3	4	TOTAL
10.							
TOTAL	100	RAW SCORE RATING TOTAL					
							Divided by 100
						RATING	=

ARCHITECT AND ENGINEER EVALUATION

CRITERIA HEADINGS AND CHARACTERISTICS

*QUALIFICATIONS - credentials, practical relevant experience, special training, references

*STABILITY - history of firm, size of firm, growth, staff tenure

*PROFESSIONAL QUALITY OF PRINCIPALS AND KEY STAFF - licensed to practice in State of Washington, educational preparation, experience with this type of project, length of time with firm, percentage of principal involvement in project, ability to cooperate and communicate with others in the project.

*FIRM'S EXPERIENCE WITH THIS TYPE OF PROJECT - past projects, recent experience with local planning and permit agencies.

*PLANNING AND BUDGET CONTROL CAPABILITIES - evidence of planning capability, budget control, references, change order history, past history of completing on schedule, pending litigation.

*WOMEN AND MINORITY-OWNED MANAGEMENT - is this a women and/or minority-owned firm? Will women and/or minorities be professional participants in this project?

SERVICE POTENTIAL - versatility of firm, specialties, creativity.

UTILIZATION OF STAFF - assignments, responsibilities and availability of staff for this project.

QUALITY OF DESIGN - evidence of past design solutions, practicality of design, aesthetic quality of design.

PRODUCTION CAPABILITY - availability of management for the project, experience of supervisor assigned, emphasis given to the importance of project supervision and control, quality control measures, communication tools.

OTHER -

*Mandatory criteria to be used in ratings of all firms.

ARCHITECT AND ENGINEER EVALUATION

INSTRUCTIONS FOR USE OF CRITERIA

1. Criteria one through five are mandatory on all reviews.

2. Select other criteria that are appropriate for the project and the professional service involved.

3. Weight the criteria in accordance with their importance to the successful completion of the project. For example, if the project requires a special knowledge, then criteria that deal with the special training or experience in the specialty required by the project will be weighted higher than other criteria.

   For convenience it is suggested that the total weighting add up to 100.

4. Once the weighting is determined, the credentials of the firms applying and the District's Consultant Data Form should be reviewed.

   All firms will be rated using the same criteria and weighting.

   A simple rating, such as the following, will assist in keeping the process of evaluation manageable:

   0 = Unacceptable
   1 = Below Standard
   2 = Standard
   3 = Above Standard
   4 = Excellent

   When a criteria rating has been determined, the rating should then be multiplied by the weighting for that criterion. This will provide a score for that particular criterion. The total of all criteria are then added together and divided by the total of the weightings. By using this approach, when all firms have been rated they will appear in a ranked order.

5. The firms ranked highest can than be interviewed to determine which firm appears to be the most qualified. Usually several firms will be interviewed for determining the most qualified.

   Not less than one women or minority-owned firm will be included in the interview process. Such a firm will be the highest-ranked women or minority-owned firm from the applicants that were initially evaluated.

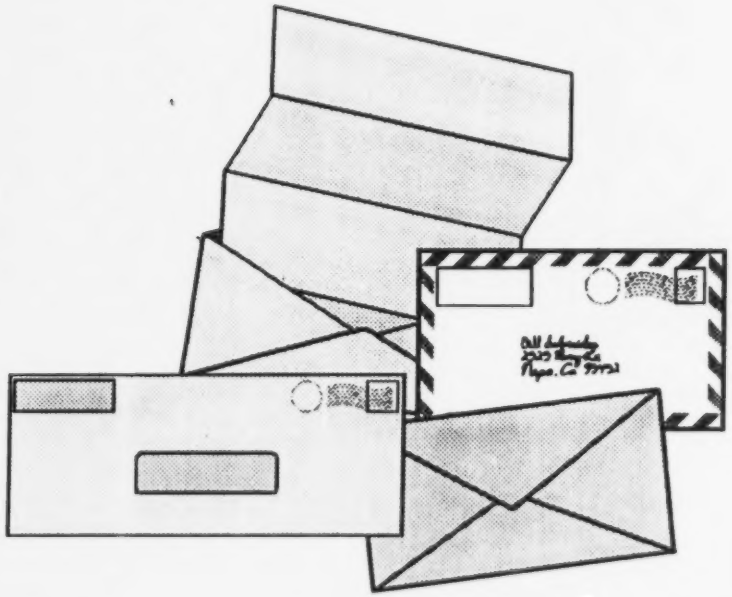
ARCHITECT AND ENGINEER EVALUATION

6. The documentation involving the ranking of firms shall be placed in that project's file.

7. The criteria may also serve as a basis for formulating questions that might be used in the interview process.

III. SELECTION PROCESS FOR LARGE CAPITAL PROJECTS

A. WRITTEN PROPOSAL SCREENING



- *WHAT WE PREPARE; WHAT'S REQUIRED AND WHY*
- *SELECTION PROCESS*
- *COMPOSITION OF REVIEWERS*

ARCHITECT SELECTION INFORMATION PACKET

TILLICUM MIDDLE SCHOOL REFURBISHMENT PROJECT

DECEMBER 1994

REQUIRED SUBMISSION ITEMS

1. Cover letter and other pertinent attachments.
2. Standard Form 254/255 for each key team member/firm.
3. Summary resume of key hands-on project personnel.

Please submit **eight copies** of the above by **12:00 noon, Wednesday, December 21, 1994** to Daunne Zinger, Manager, Capital Projects, Bellevue School District, 12037 NE 5th Street, Bellevue, WA 98005.

ATTACHMENTS:

1. Consultant Selection Process
2. Notice for Architectural Services
3. Tillicum Middle School Project Description
4. Project Schedule
5. Bellevue School District Architect Selection Criteria

SAMPLE

jft
tmasare2

1. CONSULTANT SELECTION PROCESS

Tillicum Middle School

The District is currently soliciting RFQ's from qualified consultants to perform programming, design, bidding and construction oversight services for Tillicum Middle School.

Firms will be short listed and interviewed for the project on **Thursday, January 5, 1995**. A final selection will be made at that time and a Phase I contract will be negotiated immediately.

Programming with the school building committee will take place in January through March, 1995. A schedule for the remaining activities is included in this packet.

SAMPLE

tmarsel7

BELLEVUE PUBLIC SCHOOLS
Bellevue, Washington

2. NOTICE FOR ARCHITECTURAL SERVICES

FOR

TILLICUM MIDDLE SCHOOL REFURBISHMENT

In accordance with RCW 39.80, the Bellevue School District is seeking architectural services for the refurbishment of and expansion of Tillicum Middle School. The scope of the project includes the programming, design development, construction documents, bidding and construction observation phases to update the architectural, structural, mechanical and electrical systems, and to modernize the school.

To be considered, firms must submit a cover letter with a resume outlying the firm's capabilities and experience with public projects, and Forms 254 and 255 to Daunne Zinger, Manager, Capital Projects, Bellevue School District, 12037 NE 5th Street, Bellevue, Washington 98005, not later than 12:00 noon December 21st, 1994.

Prior to submitting a proposal, firms should contact Jackie Tarantola at 455-6055 for an informational packet which includes a project description and the criteria for architectural evaluation and selection procedures.

Daunne Zinger, Manager
Capital Projects

2 times -- Daily Journal of Commerce
December 7th, December 14th

1 time -- Daily Journal American
December 7th,

jft
arcsel

SAMPLE

3. TILLICUM MIDDLE SCHOOL
PROJECT DESCRIPTION

BACKGROUND

Tillicum Middle School, located at 16020 S.E.16th, Bellevue, Washington, was opened in 1963 as a 32-classroom, four building complex on a 19-acre site. In 1974, a darkroom was added consisting of 750 square feet on the south wall of the classroom building. In 1979, the building was modernized. Additions to the building included: a library, general industrial education shop, and a gymnasium. Remodeling was accomplished in the learning disabilities classroom and the reading specialists area. Carpeting was also installed throughout the building. Alterations were made in 1989 and include: resurfacing the soccer field, replacement to the kitchen's hot water system, and water cross connection corrections. In 1991 the school received a new covered play area and the entire facility was re-roofed. In 1992, the intercom, clocks and program bells were upgraded and renovations were made to the gas piping. An upgrade to the power systems was completed in 1993.

The current size of the school is 89,239 square feet and has a capacity of 756 middle school students. The original buildings are all constructed on a concrete floor slab with a structural system of precast concrete columns/walls with a roof system of precast concrete tees. The interior walls are constructed of nonbearing masonry and wood stud infill walls. The additions in 1974 consisted of CMU walls in the new gymnasium with glu-lam beams and wood decking. The industrial arts and LRC were constructed of wood framed walls with wood joists and plywood decking. The new covered play area on the east side of the campus is constructed of steel columns, glu-lam beams and plywood decking. The parking areas are located on the west and north sides of the school. The bus loading area has been moved from the north side of the building as originally designed to the west side. The soccer and ball fields are located on the south and east sides of the school with a number of tennis courts located on the north side of the school.

PROJECT DESCRIPTION

The construction budget is approximately $3.5 million. The scope of work for refurbishment is intended to improve mechanical, electrical and architectural systems, and make upgrades to comply with fire and life safety, asbestos abatement, seismic, and Americans With Disabilities Act code requirements. Staff/administrative improvements which might include building reconfiguration and classroom additions will be part of the scope of the work and determined by a school building committee comprised of staff and community members. Presently, the City of Bellevue and the Bellevue School District are undertaking a master planning effort involving the Tillicum Middle School, Phantom Lake Elementary School and adjacent city properties to determine common recreational usage. It is possible that building and site improvements approved in this process will be incorporated into the final plans for the Tillicum Refurbishment project. A needs study identifying known building system deficiencies has been prepared.

The selected consultant team should be prepared to immediately review existing drawings and other available data and conduct preliminary design meetings with the school building committee. The team should determine solutions which will enable the District to provide a refurbished building which meets all identified needs.

Construction is scheduled to begin in June of 1996. A proposed timeline outlining the major phases is attached.

jft tmarsel3

SAMPLE

4. TILLICUM MIDDLE SCHOOL REFURBISHMENT SCHEDULE

ARCHITECT SELECTION

Advertisement for Architect Selection	December 7th and 14th, 1994
Building Orientation & Walk-through	2:45p.m. - December 14, Library
Receive Proposal/Submittals	Noon - December 21st
Select Top Firms	December 22nd
Interview Firms	January 5th, 1995
Board Approval	January 17th
Notice to Proceed	January 18th

PHASE I

Programming & Preliminary Design Phase with School Committee	January - March, 1995

PHASE II

Design Development	April - June, 1995
Design & Construction Documents Phase	June - September, 1995
Permits & Bid Phases	September - March, 1996
Construction Phase	June, 1996 - March, 1997

jft
tmarsel4

SAMPLE

BELLEVUE SCHOOL DISTRICT NO. 405

Policy and/or Procedure Reference No.
Policy No. 8825
Procedure No. 8825.1

EXHIBIT NO. 8825.1
Page 1 of 6
Effective Date: 6 May 1986
Revised: 5 March 1991

ARCHITECT AND ENGINEER EVALUATION

DATE: _____

Project _____

Firm _____

Evaluator _____

Rating: 0 = Unacceptable
1 = Below Standard
2 = Standard
3 = Above Standard
4 = Excellent

CRITERIA	WEIGHT	RATING 0	1	2	3	4	TOTAL
*1. QUALIFICATIONS - credentials, practical relevant experience, special training, references.	15						
*2. STABILITY - history of firm, size of firm, growth, staff tenure.	10						
*3. PROFESSIONAL QUALITY OF PRINCIPALS AND KEY STAFF - licensed to practice in State of Washington, education preparation, experience with this type of project, length of time with firm, percentage of principal involvement in project, ability to cooperate and communicate with others in the project.	10						
*4. FIRM'S EXPERIENCE ON THIS TYPE OF PROJECT - past projects, recent experience with local planning and permit agencies, adjacent school districts.	25						
*5. PLANNING AND BUDGET CONTROL CAPABILITIES - evidence of planning capability, budget control, change order history, past history of completing on schedule, pending dispute, resolution process (including arbitration, mediation, and litigation).	15						

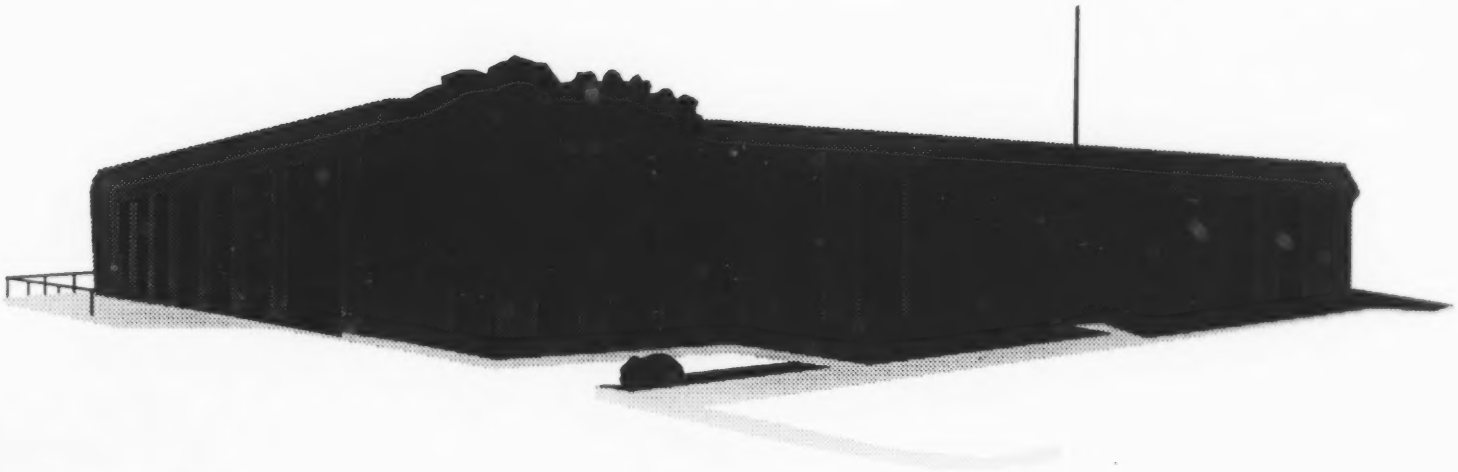
SAMPLE

CRITERIA	RATING							
	WEIGHT	0	1	2	3	4	TOTAL	
*6. WOMEN AND MINORITY-OWNED MANAGEMENT - is this a women and/or minority-owned firm? Will women and/or minorities be professional participants in this project?	5							
7. PRODUCTION CAPABILITY - Capacity of the firm and key consultants, projects on board, projected work-load.	5							
8. PROJECT MANAGEMENT - Experience assigned program manager working successfully with design team members, owners and general contractors. Site recent similar projects.	15							

CRITERIA	RATING						
	WEIGHT	0	1	2	3	4	TOTAL
TOTAL	100	RAW SCORE					
					RATING TOTAL		
							Divided by 100
					RATING		=

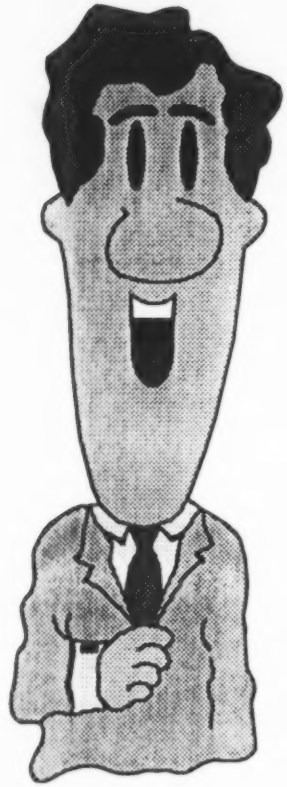
SAMPLE

B. CONSULTANT WALK THROUGH OF THE BUILDING



C. ORAL INTERVIEWS

1. *HOW INTERVIEW QUESTIONS AND SELECTION CRITERIA ARE FORMULATED*
2. *INTERVIEW PACKET FOR CONSULTANTS*
3. *ROLE OF PRINCIPAL AND STAFF*
4. *FINAL DECISION USING CONSENSUS MODEL*



Facilities Services

12037 NE 5th St Bellevue, WA 98005 (206) 455-6054 FAX (206) 455-6279

December 22, 1994

RE: Tillicum Middle School Refurbishment
Final Interviews

This letter confirms your selection as a finalist for the Tillicum Middle School refurbishment project. The Architect Selection Committee would like to interview you and your team on Thursday, January 5th at the Bellevue School District's Educational Service Center - Board Room.

Interview time: 8:00 - 9:00 AM
Address: 12111 NE 1st Street

Each finalist will be allowed one hour for the interview. You are asked to structure your presentation to respond to the following outline and the attached questions. The last fifteen minutes of your sixty minute period will be used for follow-up questions by the committee.

* Introduction-Introduce key architectural staff, consultants, etc. Describe their experience working together as a team (number of years, names of projects, etc.). Please make sure that the assigned project manager plays an active role in the interview.
* Respond to written questions
* Provide additional information which you believe will assist the committee in its decision
* Respond to the Committe's follow-up questions

The selection committee will consist of six people with representatives from Tillicum Middle School and administrators from central administration. I have enclosed for your information a list of the selection committee members, the interview schedule, and a copy of the Needs Study. Sample interview questions and the selection criteria will be provided to you after the holidays.

If you have any questions concerning any of the above, please contact me.

We look forward to meeting with you.

Dauune Zinger

Dauune Zinger, Manager
Capital Projects

Enclosure

BELLEVUE SCHOOL DISTRICT

TILLICUM MIDDLE SCHOOL ARCHITECT SELECTION

CONSULTANT SELECTION COMMITTEE MEMBERS

Jerry Bacon. Consultant

Tina Barth. Parent

Dean Kentala. Teacher

Jim Hoff. Principal

Pete Wall. Director. Facilities/Real Estate

Daunne Zinger. Manager. Capital Projects

BELLEVUE SCHOOL DISTRICT

TILLICUM MIDDLE SCHOOL ARCHITECT SELECTION

INTERVIEW SCHEDULE

8:00 - 9:00	**FIRM #1**
9:15 - 10:15	**FIRM #2**
10:30 - 11:30	**FIRM #3**
11:30 - 12:30	**FIRM #4**

BELLEVUE SCHOOL DISTRICT - TILLICUM MIDDLE SCHOOL
INTERVIEW QUESTIONS

PLEASE BRING THE FOLLOWING HANDOUTS TO YOUR INTERVIEW

Provide an organizational chart showing key architectural and consultant personnel including project managers. Describe the tasks that each individual will be performing during the various phases of the Tillicum project. Please present the information in a format that all committee members can clearly understand.

Provide a description of your current workloads and how this project will be accommodated. For the last five projects in excess of $1,000,000, identify the names of employees assigned to theses projects and indicate project phase and schedule. For your last three school projects, provide school district contact person, name of general contractor, their project manager and job superintendent, and names and firms of all consultants involved in the project.

Provide an anticipated schedule of Tillicum outlining the major milestones and time critical dates either in a GNAT or PERT/CPM format.

Please discuss the following during your interview:

I. Project Vision

A. The Tillicum refurbishment project is funded for systems and code upgrades as well as classroom additions, an administration remodel and minor building improvements which will be determined by a school building committee. Since the budget is tight, what approaches would you consider when developing design solutions to balance the needs between systems/code improvements and architectural changes/additions?

B. The Tillicum project has an opportunity to take advantage of some joint use activities with the City of Bellevue through an on-going master planning process between the two jurisdictions. The Master Plan, which identifies various recreational activities and new facilities is not funded at this time, however, the District would like to anticipate these activities so they are not precluded in the future. Attached are copies of preliminary schematics of the master plan. Realizing that your scope of work includes classroom additions and a remodel/potential expansions to the administration area, describe some of your ideas which address these needs and how you would pre-empt master planning ideas paying particular attention to site/parking issues.

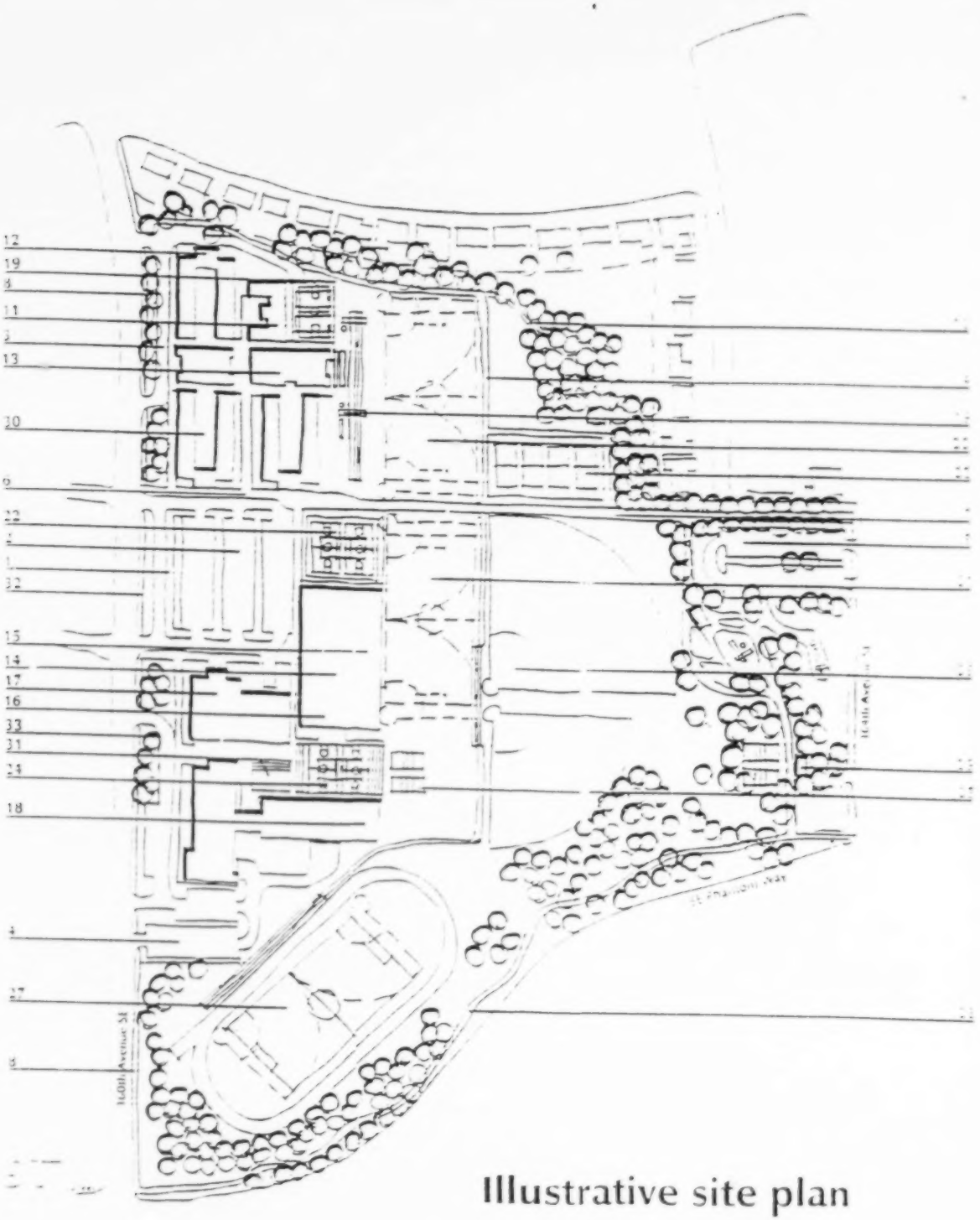
II. Project Management

A. Describe your abilities to minimize construction costs, change orders and possible future litigations. Give an example of a project which was behind schedule and/or over budget and the measures you took to remedy the situation.

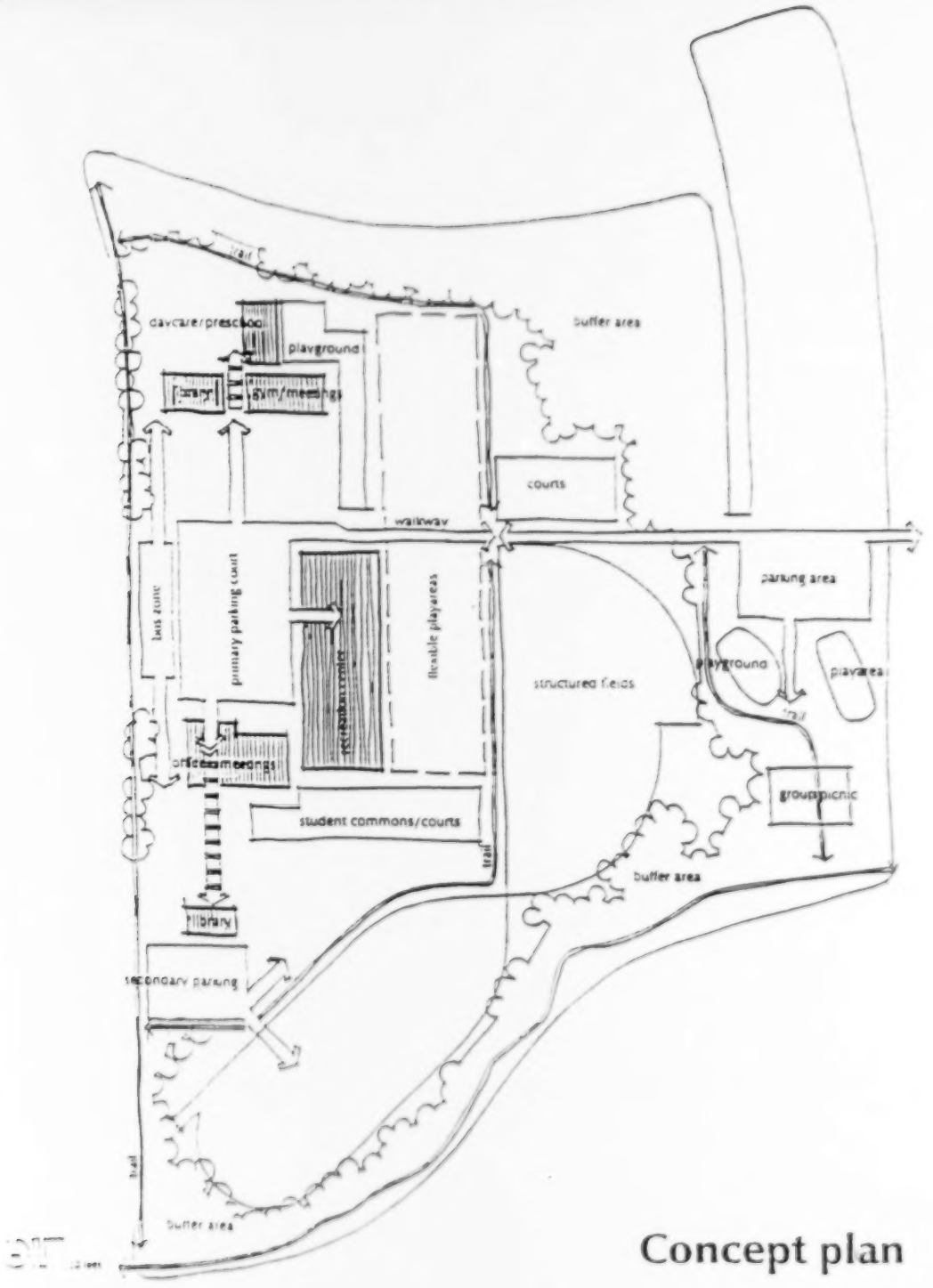
B. What experience does your firm have with the City of Bellevue's development review process, specifically clearing and grading permits, fire/waterline extension agreements, fire and life safety permits, and successfully acquiring building permits for actual construction? Describe who you have interacted with at the City and describe the types of interactions with city development review staff. Describe how your firm will deal with the City's storm drainage requirements and how you plan to minimize storm drainage requirements and keep the project on schedule for obtaining permits.

C. Explain what techniques you use to successfully manage your design team members. How do you keep them focused, on schedule and realizing that the Tillicum project is a high priority project for them.

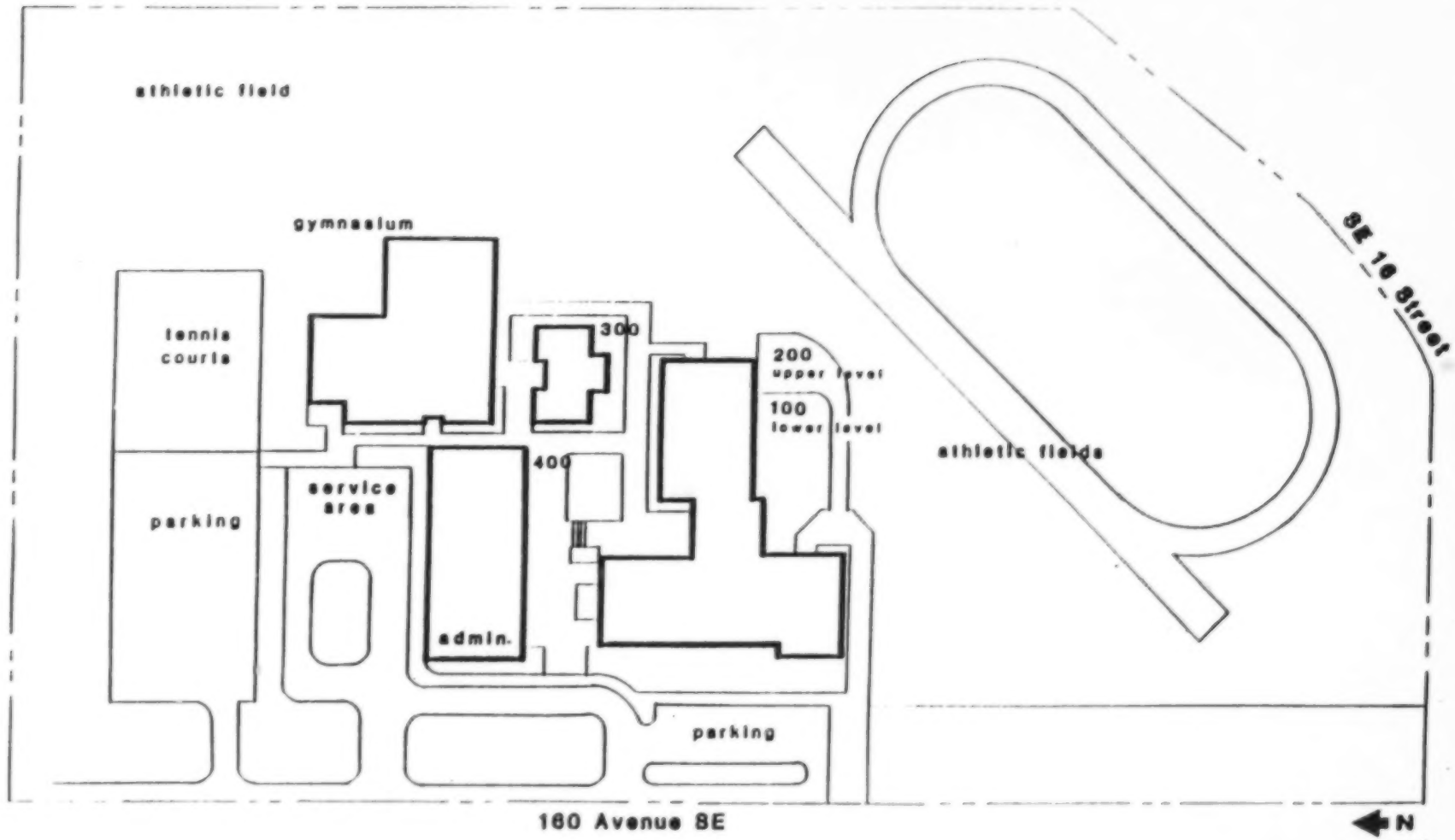
D. Identify any other comments you would like the Committee to know.



Illustrative site plan



Concept plan



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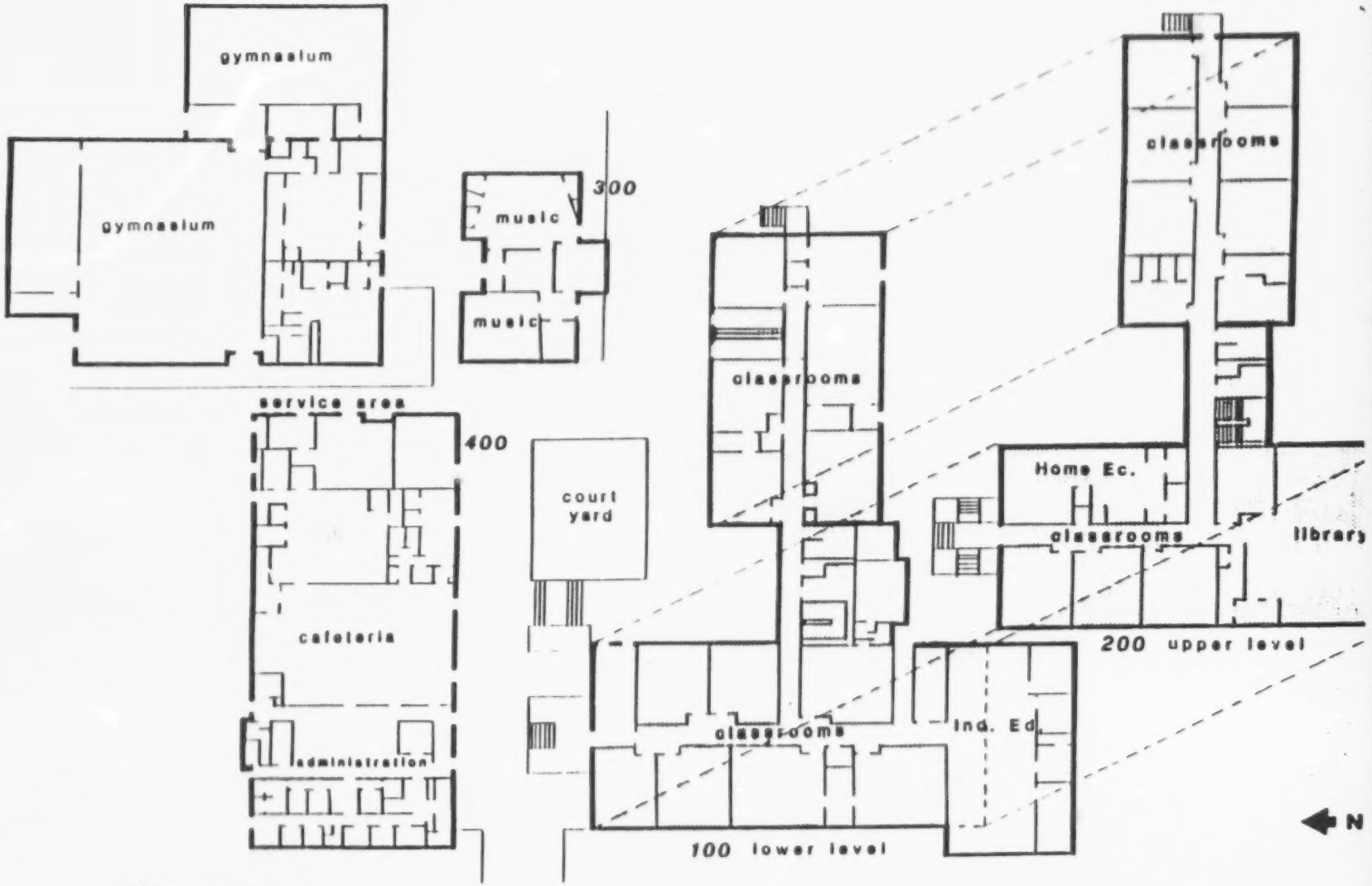
TILLICUM MIDDLE SCHOOL

16020 SE 16 Street
Bellevue, Washington

Bellevue Public Schools
Facilities Services Dept.
6/86 JH/VZ/BH

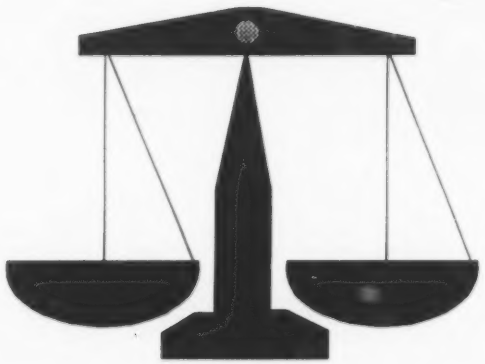
51



Bellevue Public Schools
Facilities Services Dept.
8/86 JH/VZ/BR

TILLICUM MIDDLE SCHOOL

IV. ADVANTAGES VS. DISADVANTAGES OF THIS TYPE OF ARCHITECTURAL SELECTION PROCESS



ADVANTAGES

MAXIMIZES STAFF AND COMMUNITY INVOLVEMENT

FOSTERS COMMUNITY BUY-IN TO SUPPORT FUTURE BONDS AND LEVIES

SCHOOL BUILDING STAFF DEVELOPS OWNERSHIP OF THE FINAL PROJECT

THE NEEDS OF THE EDUCATIONAL PROGRAM HAVE THE SAME STATUS AS SYSTEMS AND MAINTENANCE UPGRADES

DISADVANTAGES

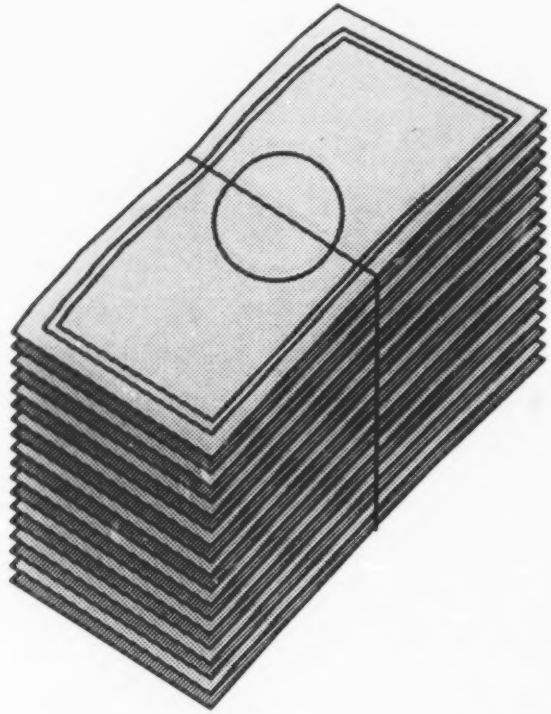
PROCESS CAN BE LENGTHY AND TIME CONSUMING

DECISION MAKING BECOMES COMPLEX AND INVOLVES MORE PEOPLE

PROJECT MANAGER CANNOT MAKE DECISIONS WITHOUT CONSIDERING SCHOOL'S PRIORITIES

GREATER RISK OF HIRING CONSULTANTS SKILLED AT MAKING GOOD PRESENTATIONS BUT WEAK ON OTHER CRITICAL PHASES OF THE PROJECT

V. CONSULTANT NOTIFICATION AND FEE NEGOTIATIONS



VI. HOW TO MEASURE A "SUCCESSFUL MATCH"

POST EVALUATION

- DID THE DESIGN TEAM SUCCESSFULLY SECURE THE TRUST AND CONFIDENCE OF THE TEACHING STAFF AFFECTED BY THE BUILDING CHANGES?

- DID THE CONSULTANT TEAM DESIGN A FACILITY WITHIN THE ESTABLISHED BUDGET AND TIMELINES?

- WAS THE CONSULTANT TEAM RESPONSIVE TO THE OVERALL DIRECTION OF THE PROJECT AS COMMUNICATED BY THE OWNERS PROJECT MANAGER?

- DID THE CONSULTANT TEAM QUICKLY GAIN AN UNDERSTANDING OF THE DISTRICT'S "CULTURE" AND WORK SUCCESSFULLY WITHIN IT?

- WHEN THE BUILDING PROJECT WAS COMPLETE, WAS USER SATISFACTION HIGH?

- WILL THE CONSULTANTS BE STRONGLY CONSIDERED FOR OTHER PROJECTS BASED ON THEIR PERFORMANCE ON THIS PROJECT?

QUESTIONS?????